SW AP316 Creating and Updating an Employee Profile

Creating and Updating an Employee Profile Overview

An employee profile must be entered in Cardinal before:

- An employee can be granted access to Cardinal
- An employee's travel or expense transactions can be entered or reimbursed

The employee profile contains the employee name, address, employee status, Agency Business Unit, department, supervisor, cash advance level, and payment information (such as EDI bank account information).

Employee Profiles can be added by the HR Administrator in Cardinal HCM and limited updates are permitted by agency users with the Employee Profile Sync Maintenance role.

Adding a Proxy

In order to have expense transactions entered, every employee must have at least one proxy (authorized user) set up. After creating the employee profile, be sure to add a proxy or proxies for every employee profile created. For more detailed information about how to authorize a proxy, see the job aid entitled **AP315 Authorizing a Proxy for an Employee** located on the Cardinal website in **Job Aids** under **Learning**.

The Cardinal Remittance Electronic Data Interchange (REDI) Authentication Interface process verifies all newly created employee accounts in the REDI Virginia system.

Banking information is interfaced daily from the Cardinal Human Capital Management (HCM) system. The DOA EDI Coordinators have access to enter this information when necessary (e.g., when HCM update has not yet been processed).

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Creating a New Employee Profile

After HCM go-live in October 2021, Release 1 agencies will not have add/update access to the Employee Profile page other than changing the “Default” flag for employees with multiple records so that the expenses can be submitted by the related agency. They will continue to have access to add/update the “Default ChartField Values” section on the Employee Profile Organizational Data page as well as information on the “User Defaults” page. Updates to name and address should be entered in Cardinal HCM, by the HR Administrator, and the updates will sync to Cardinal FIN.

Employee Working for Multiple Cardinal Agencies

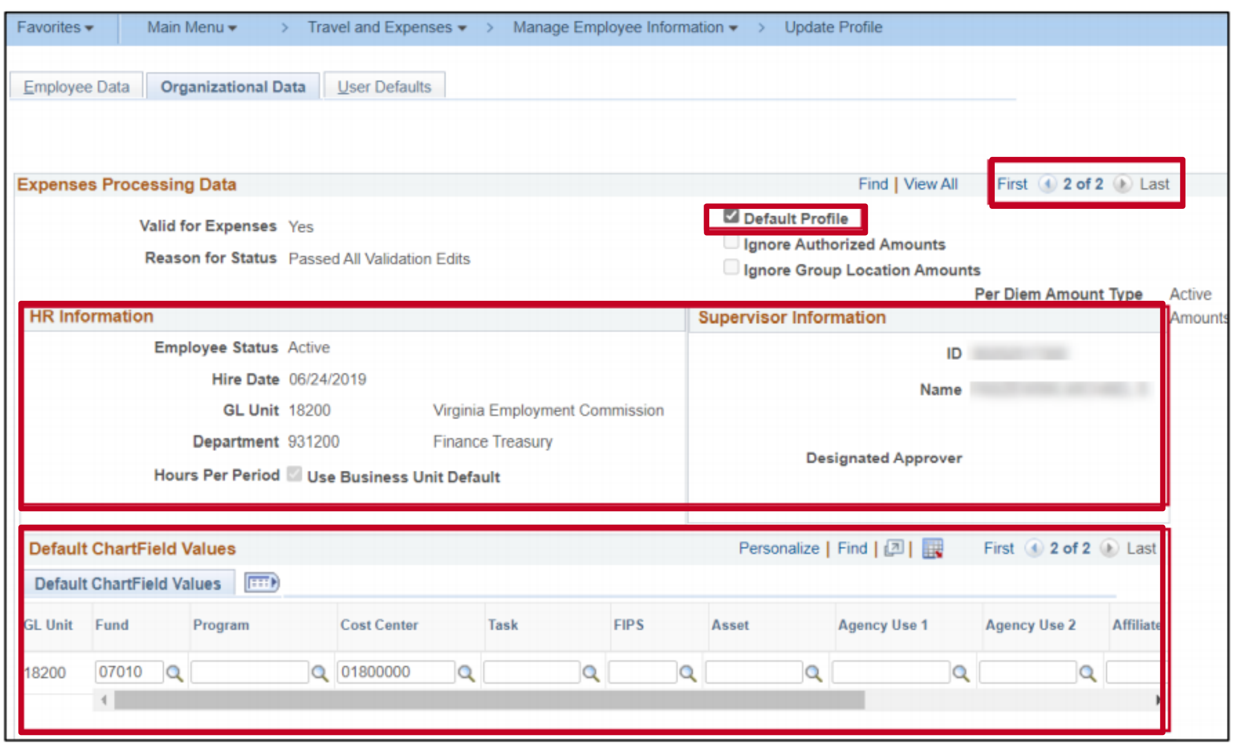
If the employee is working for more than one state agency, a profile must be created for each agency from which the employee is requesting a reimbursement of expenses:

1. Employees working in multiple agencies will be setup with one Employee Profile associated to multiple agency records reflecting each job (i.e., Employee Record Number)
2. In Cardinal HCM, each employee will only have one Cardinal Employee ID. Cardinal Employee IDs are established based on PMIS IDs in the format of (00 + 7-digit PMIS ID + 00). Employee Profiles are established in FIN using the Cardinal Employee ID.

Only one Employee Record Number can be set as “Default” and Expense transactions (Expenses, Travel Authorizations & Cash Advances) can only be created against the record marked as “Default”. When an agency needs to submit transactions for a different Employee Record Number (job) other than the one marked as “Default”, the “Default” check box on the Employee Profile must be updated accordingly before creating the transactions.

The screenshot provided below highlights the key changes of the HCM impacts to the “Organizational Data” tab for the Employee Profile page:

- Multiple Employee Records
- Default Profile flag (can be updated to the record of expense transaction)
- HR and Supervisor information are grayed out and cannot be modified
- Default ChartField Values can be updated as needed



Updating an Employee Profile

If the Employee Profile already exists, there are various reasons why it may need to be updated.

The edits to the Employee Profile for these three scenarios would need to be made by the HR Administrator in Cardinal HCM:

- Employee works for your agency and requires changes (e.g., moves to another department, assigned to a new supervisor, etc.).
- Employee moves from one state agency to another state agency.
- Employee leaves your agency and you need to update the status to terminate.

These edits to the Employee Profile are made by an employee with the Employee Sync Maintenance role:

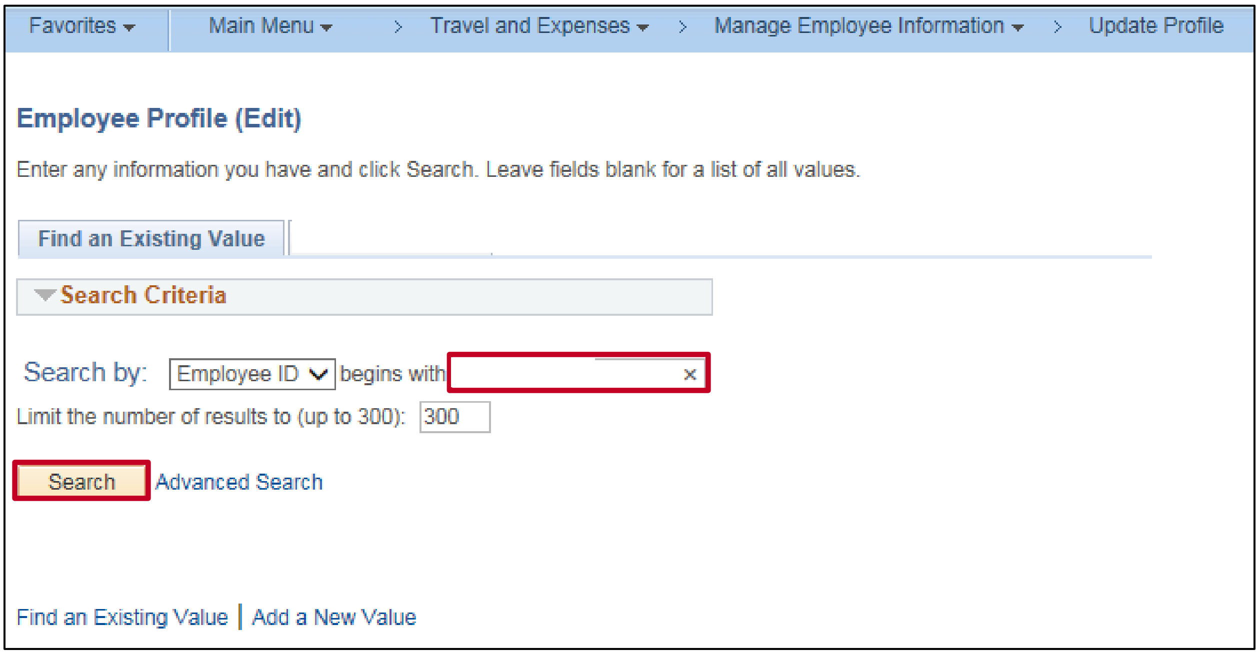
- Changing the “Default” flag for employees with multiple records so that the expenses can be submitted by the related agency
- Add/Update the “Default ChartField Values” section on the Employee Profile Organizational Data page
- Add/Update information on the “User Defaults” page

Changing the Employee Profile “Default” flag

If an employee has multiple employee records, change the default flag for the submitting agency so that the expenses can be submitted by the related agency.

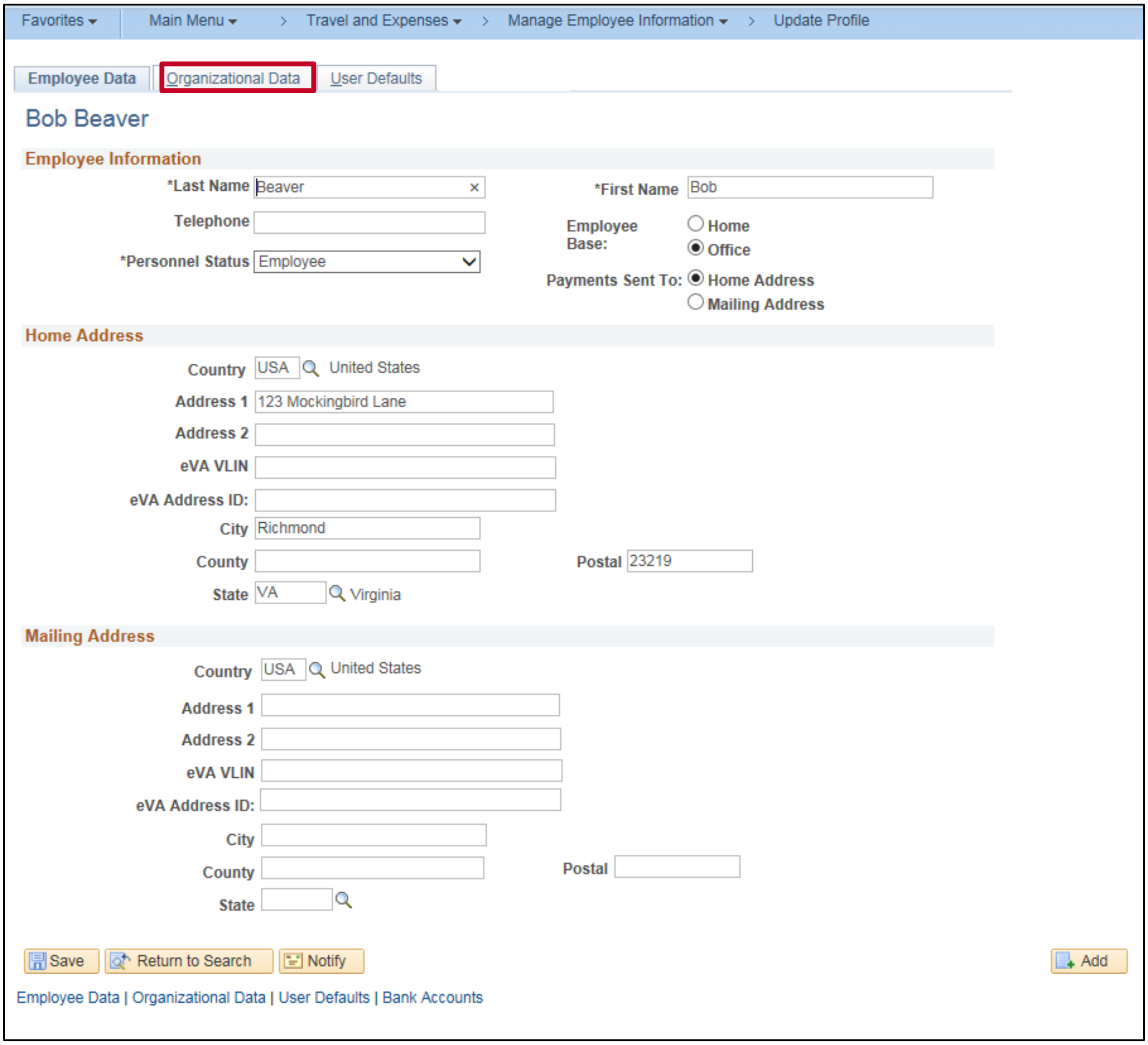
Navigate to the **Update Profile** page by using this path:

Main Menu > Travel and Expenses > Manage Employee Information > Update Profile



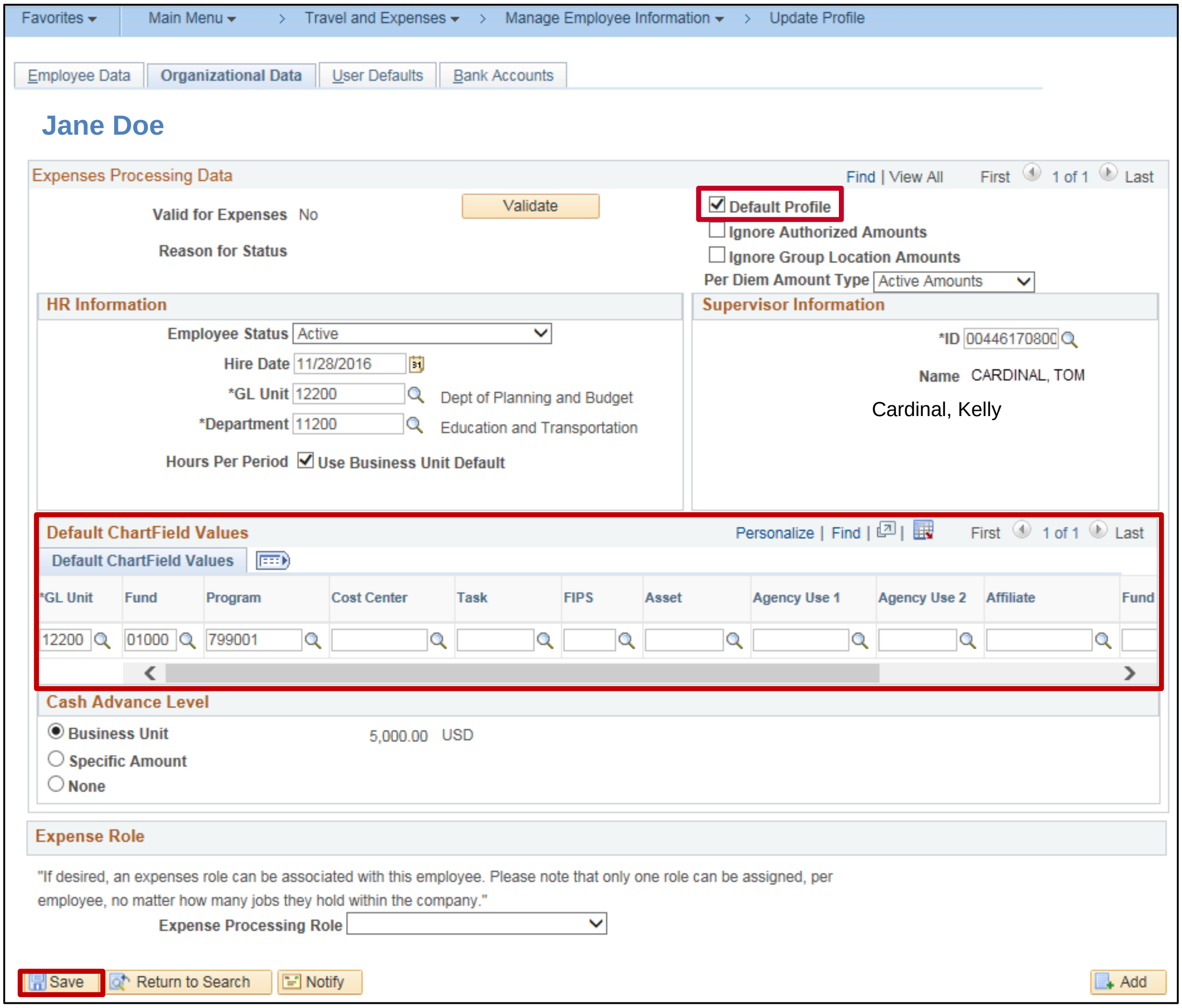
1. Enter the **Employee ID**.
2. Click the **Search** button.

Thte Employee Profile page displays.



3. Click the **Organizational Data** tab.

The **Organizational Data** tab displays.



4. Update the employee profile information as appropriate.

5. Click the **Save** button. Any changes made to the employee profile are saved.

Employee Moved from One Cardinal Agency to Another Cardinal Agency

If an employee has moved to your agency from another Cardinal agency, there are several steps that you will need to complete.

Example: If an employee is leaving Agency A and moving to Agency B

Agency A must:

- Have the HR Admniistrator change the employee status on the profile to Terminated for your agency.
- If this employee is a Supervisor (approving other employee's expenses at your agency), have the HR Admniistrator remove the employee from the Supervisor role for all impacted employees and update with new Supervisor.
- Delete all proxies for that employee. See the job aid entitled **SW AP315 Authorizing a Proxy for an Employee** for details.

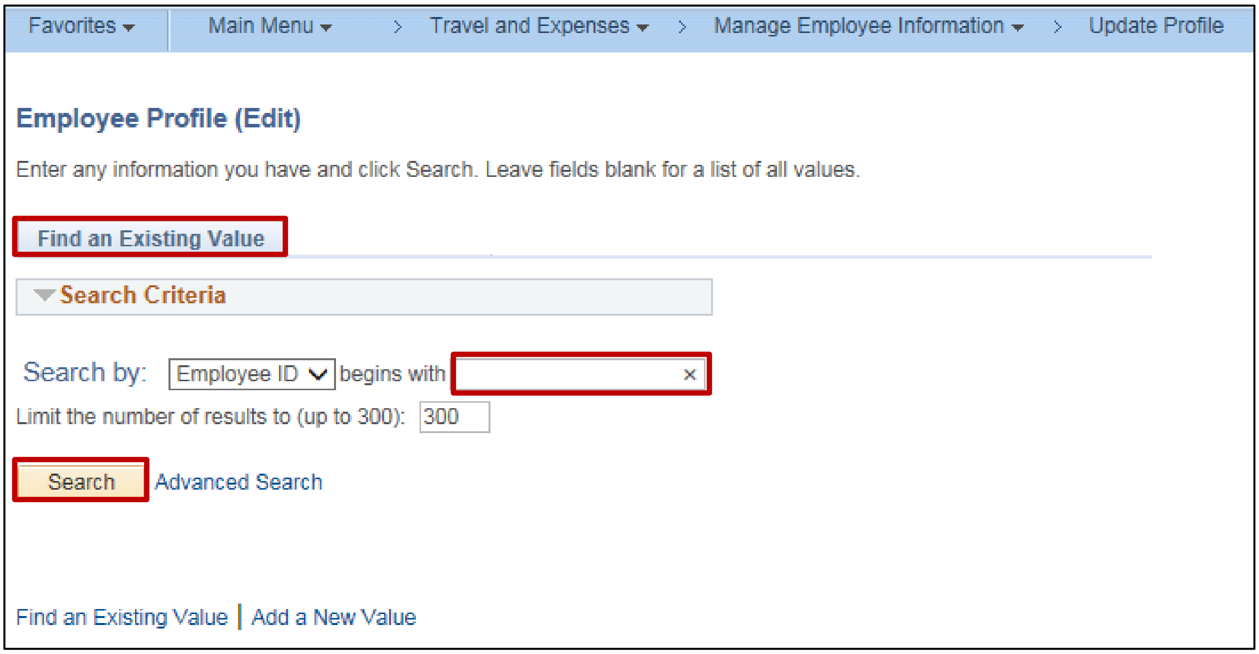
Agency B must:

- With the implementation of Cardinal Human Capital Management (HCM), Expense Employee profile information will be synced from HCM to Cardinal Financials (FIN)
- Add a proxy/proxies for the employee. See the job aid entitled **SW AP315 Authorizing a Proxy for an Employee** for details.

1. Navigate to the **Employee Profile (Edit)** page using the following path:

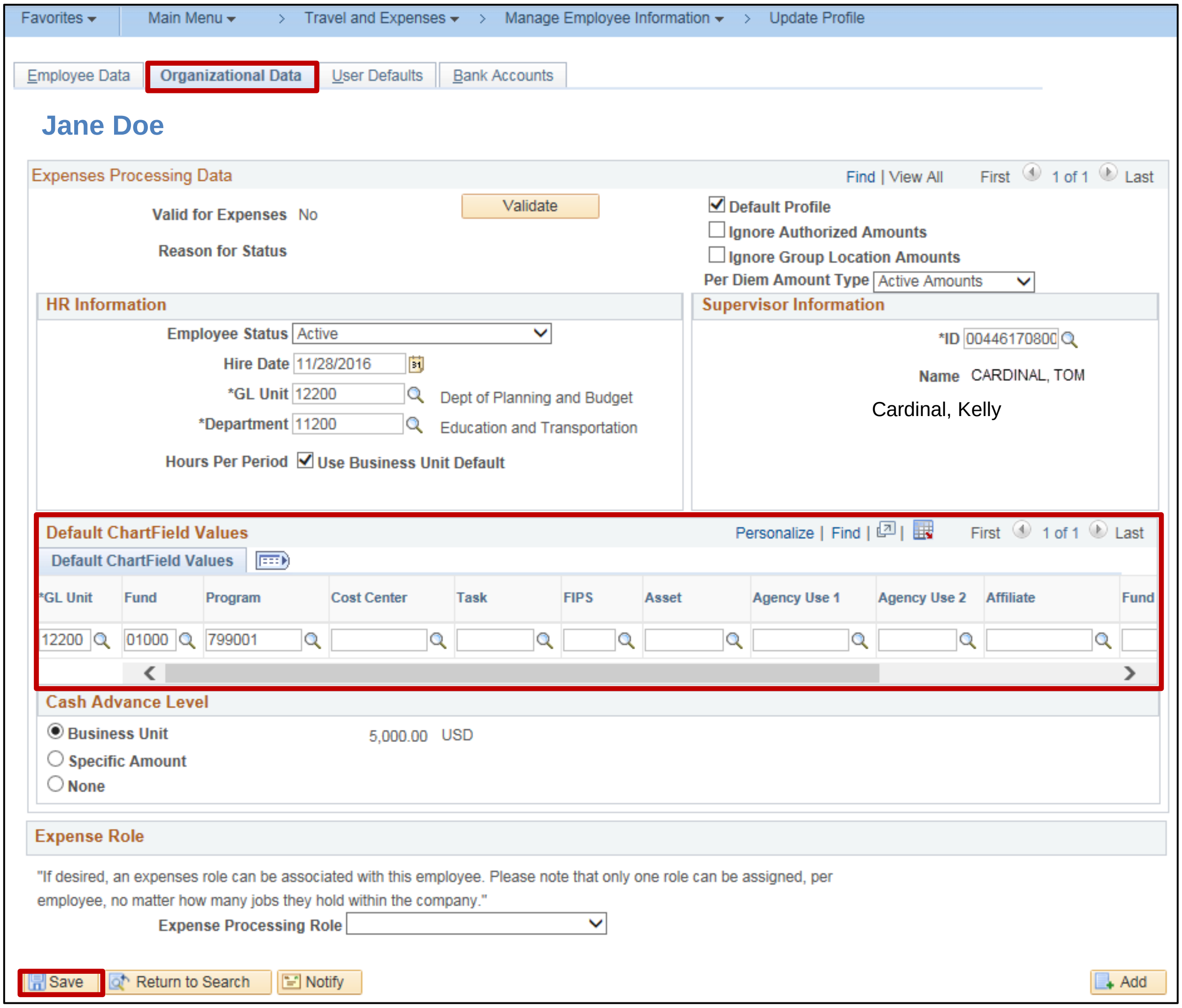
   Main Menu > Travel and Expenses > Manage Employee Information > Update Profile

The **Employee Profile (Edit) Search** page displays.



2. Click the **Find an Existing Value** tab.
3. Enter the **Employee ID** number.
4. Click the **Search** button.

The **Employee Profile** page displays.



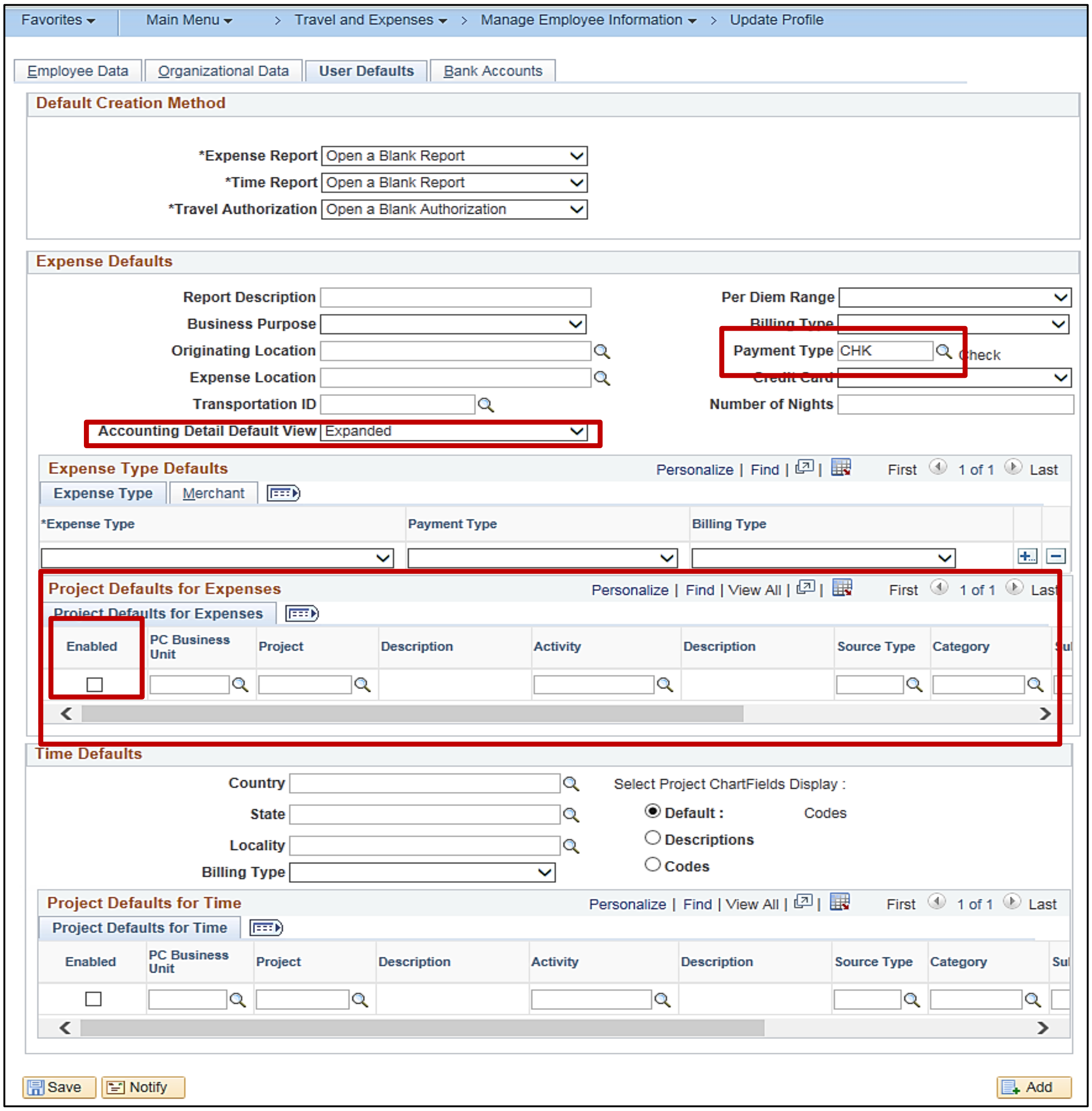
5. Click the **Organizational Data** tab.

6. Update the **Default ChartField Values** with those from your Business Unit.

7. Click on the **User Defaults** tab.

Note: These are defaults only and can be changed during data entry.

The **User Default** tab page displays.



8. Make any necessary updates to specify defaults that reduce data entry time for Travel Authorizations, Cash Advances, and Expense Reports. The **Time Defaults** fields are not used.

9. Select **Payment Type** of **Check** in the **Expense Defaults** section to avoid having to key this value on every expense line.

10. Select **Expanded** in the **Accounting Detail Default View** field to display the Accounting Detail section on the Expense Report or Travel Authorization as opened instead of having to click to open.

    Note: Project ChartFields can be defaulted in the **Project Defaults for Expenses** section.

11. Click the **Enabled** checkbox so these values default on the Travel Authorization and Expense Report.

12. Click the **Save** button.

    Note: Review edits on the Employee Profile Expense Employee synced from HCM to Cardinal Financials (FIN). For additional information, please contact your HR Administrator or refer to Job Aid titled **HR351 Managing an Inter-Agency Transfer**.

Changing an Employee Profile Status to Terminated

When an employee no longer works for your agency, the Employee Profile Status needs to be changed to **Terminated**. This should only occur after all Expense transactions have been either paid or deleted and there are no items in the queue for the employee to approve.

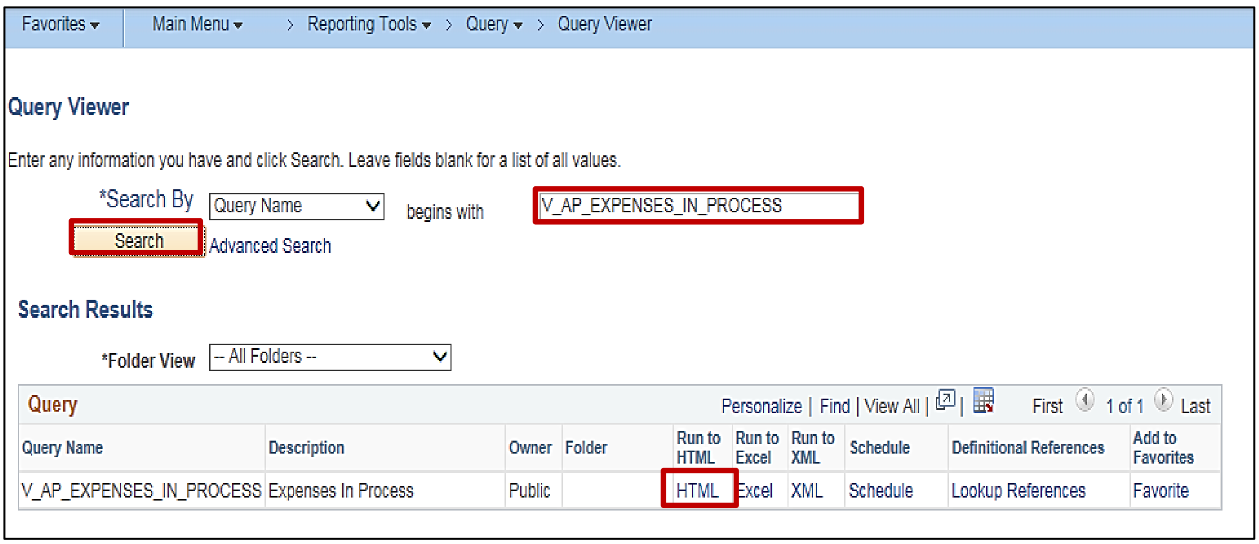
Verify there are no pending transactions

1. Run the **V_AP_EXPENSES_IN_PROCESS** query to identify any transactions in progress.

2. Navigate to the **Query Viewer** page using the following path:

Main Menu > Reporting Tools > Query > Query Viewer

The **Query Viewer** page displays.



3. Enter the Query Name **V_AP_EXPENSES_IN_PROCESS**.

4. Click the **Search** button.

5. The **Query Name** displays in the **Search Results** section of the page. Click the **HTML** link.

The **Expenses in Process** query displays.

V_AP_EXPENSES_IN_PROCESS - Expenses In Process

Business Unit (% for all) 15100

Dept ID (% for all) %

View Results

Download results in : Excel SpreadSheet CSV Text File XML File (5 kb)

View All | First 1-

	Report Type	Business Unit	Department ID	Current Approver User ID	Approver Type	Report ID	Report Status	Employee ID	Employee Name	Report Description	Total Amt	Amt Due Employee	Budget Status	Accounting Date	Submit Date	Entered By Userid	Out of Policy	Duplicates Exist	Associated Travel Auth ID	Associated Advance ID
1	Advance	15100	95400			0000000872	Staged	0098762016	Ranger, Pete	Class Fee	250.00	250.00		11/17/2016	11/17/2016	FINUSER01				
2	Advance	15100	95400			0000000873	Staged	0098762016	Ranger, Pete	Business Writing Class Fee	250.00	250.00		11/17/2016	11/17/2016	FINUSER01				
3	Advance	15100	95400			0000000874	Staged	0098762016	Ranger, Pete	Registration Fee and Expenses	250.00	250.00		11/29/2016	11/29/2016	FINUSER01				
4	Expense Report	15100	95400	UHK37558	SUPERVISOR	0000106196	Submitted for Approval	0098762016	Ranger, Pete	Business Writing Class	61.53	61.53	N	11/17/2016	11/17/2016	FINUSER01	N	N		
5	Expense Report	15100	95400			0000106195	Staged	0098762016	Ranger, Pete	Quarterly Meeting	105.30	105.30	V	11/30/2016	11/17/2016	FINUSER01	N	N		
6	Expense Report	15100	95400			0000106197	Staged	0098762016	Ranger, Pete	Business Writing Class	311.88	11.88	V	11/30/2016	11/29/2016	FINUSER01	N	N		
7	Travel Authorization	15100	95400	UHK37558	SUPERVISOR	0000005164	Submitted for Approval	0098762016	Ranger, Pete	Quarterly Meeting	137.10	0.00	V	11/17/2016	11/17/2016	FINUSER01	N	N		

6. Enter your agency **Business Unit** in the **Business Unit** field.

7. Enter the **Department ID** of the employee that needs to be terminated or **%** to show all departments.

8. Click the **View Results** button to run the query.

9. Review the results to determine if the employee you need to terminate has any transaction in progress. If so, ensure the transaction(s) are approved or deleted prior to terminating the employee in the system.

Once all items are clear and the employee does not display on the list, you can start the process to terminate the employee in Cardinal.

Terminate the employee in Cardinal

Contact the HR Administrator for Cardinal HCM to update the Employee Profile to show the employee as **Terminated**.